



How to handle No-Shows and Cancelled Appointments in TheraNest

Get ready for some fun!!!!

When your client cancels an appointment (before 24 hours)

- Go to the TheraNest calendar
- Find the appointment
- Delete the appointment by clicking on the trash can icon
- If the client cancels with Jessie, she will not delete the appointment so that there is an explanation of what happened. If that's the case, you'll still want to delete the appointment.

When your client cancels an appointment within 24 hours

- Go to the TheraNest calendar, open the appointment
- Change Status to "Late Cancel" and include the reason
- Change the Service Type to "Cancellation/Missed Appointment fee"
- Be sure to delete the original service type
- Go to the client's ledger
- Make a New Invoice
- Accept payment (with their credit card)
- Send them the paid invoice

When your client does not show for an appointment

- Go to the TheraNest calendar, open the appointment
- Change Status to "No Show"
- Change the Service Type to "Cancellation/Missed Appointment fee"
- Be sure to delete the original service type
- Go to the client's ledger
- Make a New Invoice
- Accept payment (with their credit card)
- Send them the paid invoice

If you choose not to charge the late cancellation/no show fee, make the invoice, change the amount to be \$0, and save.